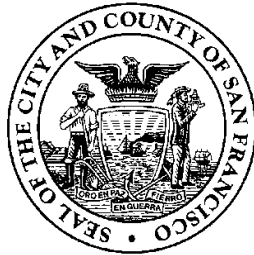


**City and County of San Francisco  
Human Services Agency**

**Request for Proposals 1151 for:  
In-Home Supportive Services (IHSS) – Contract Mode**



Request for Proposals Issued:  
Pre-Proposal Conference:  
Deadline to Submit Proposals:

December 17, 2024  
December 26, 2024  
January 15, 2025

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**Attachments**

Attachment 1: Grant Agreement (form G-100)

Attachment 2: Budget Forms

# I. INTRODUCTION AND SOLICITATION SCHEDULE

## A. Introduction

### 1. General

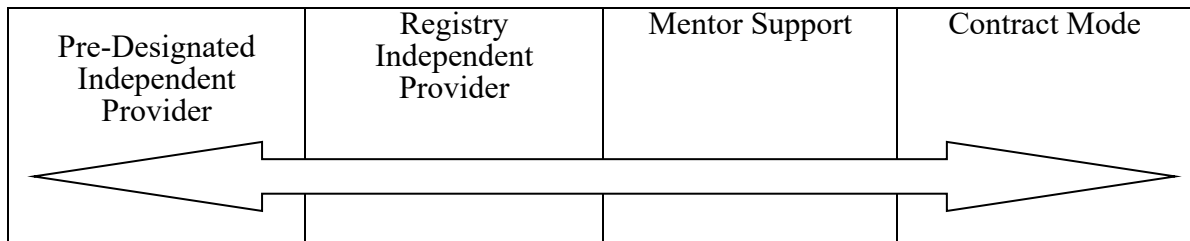
The San Francisco Human Services Agency (SFHSA) announces its intent to seek proposals from nonprofit organizations interested in providing In-Home Supportive Services (IHSS) – Contract Mode within and for the City and County of San Francisco. The In-Home Supportive Services program provides paid assistance to income-eligible older adults and adults with disabilities so they can safely remain in their own homes.

The purpose of this RFP is to provide trained in-home care providers to older adults and adults with disabilities so they can safely remain in their own homes, and to facilitate home care services for IHSS recipients who are unable to hire or supervise their own home care needs.

### 2. Background

The IHSS Program pays for a variety of services, including household chores, related services such as meal preparation/laundry, personal care and paramedical services. In San Francisco, the IHSS Program is supported by the Continuum of Choice and Support, which provides a range of supportive options for IHSS recipients to receive services.

#### SF IHSS Continuum of Choice and Support



The IHSS program is a consumer-directed service, and recipients have discretion in hiring their own Independent Provider (IP). Most IHSS recipients come to the IHSS Program with a pre-designated IP, generally a family member or friend. For recipients who can manage their own care, but do not have a pre-designated IP, they can use the IHSS Public Authority’s Registry and/or IP Plus program to hire an IP. IHSS recipients who are unable to hire or supervise their own IPs, generally due to cognitive and behavioral health disabilities, are served through the Contract Mode. In the Contract Mode, the agency hires and supervises the recipient’s provider as well as provides coordination and supportive services to the recipient.

The IHSS Program is a Federal/State/County funded, county administered program designed pursuant to the California Department of Social Services (CDSS) MPP Section 30-700, as an alternative to out-of-home care. Payment for services under any grant/contract resulting from this RFP is dependent upon the availability of County, State, and Federal funds. The County reserves the right to reject any and all proposals as stipulated in the California Department Social Services (CDSS) Manual of Policy and Procedures (MPP) sections 23-614 and 23-615. This RFP is promulgated in accordance with Title XIX and Title XX, of the Social Security Act; California State Welfare and Institutions Code, Sections 10553, 10554, 12300 et seq. and 14132 et seq.; and CDSS MPP Divisions 10, 19, 21, 22, 23, 30 and 46 et seq.; and California Department of Health Regulations, California Code of Regulations Title 22, Sections 50000 et seq., Office of Management and Budgets (OMB) Circulars.

DAS must approve the use of any subcontracts for the core services proposed under this RFP. For example, heavy cleaning or provider training and support activities.

The source of funding for these services includes federal, state, and local funds. DAS shall not be required to provide any definite units of services, nor does DAS guarantee any minimum amount of funding for these services. DAS expects that the program will serve approximately 625,000 hours in FY 25-26 to up to 1,100 clients at any given time. DAS will establish with the Grantee an hourly cost for home care services rendered. The grantee will be paid based on the number of hours served monthly times the rate. The current not to exceed hourly rate is \$63.61. Proposals should comply with all anticipated wage increases prescribed by the City's Minimum Compensation Ordinance. If the actual hourly rate exceeds the established rate because DAS referred fewer than expected hours, DAS and grantee may negotiate a new rate. Such negotiation would include a full review of Grantee's administrative expenses.

### **3. Diversity, Inclusion, and Racial Equity**

The San Francisco Human Services Agency (SFHSA) is committed to a culture of inclusion in which our differences are celebrated. Everyone should have what they need to thrive no matter their race, age, ability, gender, sexual orientation, ethnicity, or country of origin. The Department believes that a diverse and inclusive workforce will produce more creative and innovative outcomes for the organization, and ultimately, its clients.

SFHSA is committed to combating systemic racism and disparate impact of governmental services by advancing racial equity in all aspects of our work, ensuring access to services and providing support to communities to ensure their ability to succeed and thrive.

SFHSA seeks to partner with community-based organizations that share these values in their organizational culture and program services. The agency sees our contracted community-based partners and their work as a means to enhance and further advance efforts to address racial equity and inclusion across San Francisco.

Respondents to this request for proposals must ensure that they clearly demonstrate how these values are exemplified through their organizational and program operations. This should include a description of the organization's plans, strategies, and activities to address racial equity and inclusion among staff and program participants, as well as internal controls to regularly review current practices through the lens of racial equity and inclusion to identify areas of improvement.

Additional examples of information to be provided are the organizational mission and/or inclusion statements, non-discrimination documents, and/or other supporting documents, community outreach plans, staff training activities on racial equity, and a description of or data on the demographics of staff and program participants.

### **4. Selection Overview**

The City shall award a grant to one Proposer that meets the Minimum Qualifications of this Solicitation and obtains the highest-ranking scores. Responsive Proposals will be evaluated by a panel ("Evaluation Panel") consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined herein.

#### **B. Anticipated Term**

A grant awarded pursuant to this Solicitation shall have a tentative term of four (4) years from July 1, 2025 to June 30, 2029, subject to annual availability of funds, annual satisfactory of grantee performance, and need. SFHSA reserves the right to enter into grants of a shorter duration.

**C. Anticipated Not to Exceed Amount**

The total estimated annual funding for this RFP is approximately \$36,000,000 per year, which may increase or decrease depending on funding availability. The funding amounts listed in this RFP are anticipated initial funding awards, based on current budget availability. The source of funding for these services is state, federal and local funds. Actual awards will be determined by the number of responsive proposals that meet the Department’s strategies and objectives, and funding may be less or more. **Please submit budget requests according to the limits in this RFP**, however, SFHSA may negotiate different funding allocations, grant terms, and project goals before finalizing awards. Should additional funding become available, award amounts may be increased significantly beyond the originally anticipated amount at a level commensurate to the details in the RFP.

All decisions regarding the size, length, and scope of future funding awards are subject to SFHSA approval and budget availability. Some of the service areas may not be funded initially, but the Department may award unfunded proposals within the term of this RFP if funds become available that align with the services proposed. Future funding is not guaranteed, and funding amounts and terms will depend upon the performance of the grantee during the initial award period, as well as other policy considerations as determined by SFHSA. SFHSA reserves the right, in its sole discretion, to not renew funding awards.

**D. Cooperative Agreement**

Any other City department, public entity or non-profit made up of multiple public entities, may use the results of this Solicitation to obtain some or all of the commodities or services to be provided by proposer under the same terms and conditions of any grant awarded pursuant to this Solicitation.

**E. Solicitation Schedule**

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change.

<b>Proposal Phase</b>	<b>Tentative Date</b>
Request for Proposals Issued	December 17, 2024
Pre-Proposal Conference (virtual)	December 26, 2024 at 10:30 AM
Deadline for Written Questions	December 31, 2024 at 10:30 AM
Deadline to Submit Proposals	January 15, 2025 at 3:00 PM
Tentative Evaluation of Proposals	January 2025
Tentative Notice of Award	January 2025
Tentative Date Services are to Begin	July 1, 2025

**F. Definitions (include the following as applicable; add more as needed)**

DAS	Department of Disability and Aging Services
SFHSA	San Francisco Human Services Agency
City	City and County of San Francisco
CMIPS II	Case Management, Information and Payrolling System II
HSA	Human Services Agency of the City and County of San Francisco
Medi-Cal	Medi-Cal provides free or low-cost health insurance for eligible individuals that comes with a range of health benefits and services, including IHSS.
IHSS	In-Home Supportive Services

Independent Provider/IP	The eligible and approved individual who delivers the IHSS tasks authorized by the referring DAS Social Worker to the recipient.
Home Care Provider	The individual employed and supervised by the Contract Mode Provider who delivers the IHSS tasks authorized by the referring DAS Social Worker to the recipient.
Intensive Supervision	Frequent contact and support to both IHSS recipient and home care providers in order to overcome barriers to service delivery
OSHA	Refers to California Occupational Safety and Health Administrations
Recipient	Persons determined eligible by DAS for IHSS. To be eligible, recipients must be living in their own homes within the boundaries of the City and must meet one of the following conditions: <ol style="list-style-type: none"> <li>a. Be sixty-five years or older or a person with a disability</li> <li>b. Currently receive Full-Scope Medi-Cal</li> <li>c. Receive approval from a Licensed Health Care Professional to receive IHSS through IHSS Health Certification Form SOC 873, per Welfare and Institutions Code section 12309.1</li> </ol>
Registry IP	An IP who is listed in the Registry database.
Public Authority	The agency that helps recipients find providers, investigate the background of providers and serves as the employer of record for collective bargaining. The SF IHSS Public Authority also provides Back-up Provider Services (BUPS) for IHSS recipients.

### **G. Target Population**

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

### **H. Eligibility**

1. To be eligible for IHSS, recipients must be living either in their own homes, Single Room Occupancy hotels, shelters, or public or senior housing within the boundaries of San Francisco County, and must meet the following conditions:
  - a) Currently receive Full-Scope Medi-Cal
  - b) Receive approval from a Licensed Health Care Professional to receive IHSS through IHSS Health Certification Form SOC 873, per Welfare and Institutions Code section 12309.1
2. Grantee will serve IHSS recipients who are unable to hire and supervise their own IPs, generally due to behavioral health and/or cognitive issues that create barriers to service delivery. The target population will benefit from on-going and intensive supervisory interventions that aim to reduce barriers to service and increase the recipient's ability to remain safely in the community. An example of a recipient in Contract Mode services is someone who is formerly homeless; has struggled with cluttering; and who may have behavioral health issues or complex care needs.

## II. SCOPE OF WORK

The Scope of Work is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project. Proposers should use this description when designing their proposed programs. However, proposers may suggest modifications and/or additions that will, in their estimation, make the program more feasible or effective. The description below outlines the key program elements and services the selected vendor(s) will provide.

### A. Description of Services

In-Home Supportive Services Contract Mode will:

1. Ensure a minimum availability of shifts, 7am to 7pm, 7-days a week including holidays, of quality, trauma-informed and culturally and linguistically appropriate in-home care for complexly diagnosed eligible older adults and adults with disabilities to remain safely in their own homes; and
2. Provide and schedule skilled home care providers for recipients who are unable to hire or supervise their own IPs, or who have additional capacity and service issues; and
3. Provide intensive supervision and training to home care providers to ensure the delivery of safe, person-centered and effective domestic, personal, paramedical, and protective supervision services; and
4. Provide service coordination and barrier removal services to recipients to maximize recipients' engagement in IHSS services; and
5. Troubleshoot barriers to service and/or recipient-specific challenges that could result in termination of services.
6. Provide appropriate and required training for home care providers (HCPs) addressing managing recipient-specific challenges that could result in termination of services.
7. Coordinate/communicate the need for wrap-around case management services and/or referrals for recipients determined to need additional supports outside of IHSS.
8. Provide timely and quality IHSS to recipients as authorized by DAS IHSS Social Workers; and
9. Collaborate with DAS to develop effective and timely resolutions to problems that arise in the delivery of IHSS to recipients; and
10. Ensure accessibility of all recipient care plans to all staff providing service to that recipient.
11. Communicate updates related to recipient care plans to IHSS Social Workers.
12. Comply with the Electronic Visit Verification (EVV) federal statutory requirements pursuant to Subsection l of Section 1903 of the Social Security Act (42 U.S.C. 1396b) by ensuring the EVV system verifies for all providers: type of service performed; individual receiving the services; date of service; location of service delivery; individual providing services; and times the service begins and ends; and
13. Provide staffing ratios that are appropriate to serve referred clients and that meet the established per hour rate set by DAS.

14. Accept and process new recipient referrals from DAS Social Workers ensuring IHSS services begin within 5 business days of referral or within 24-hours when the referral is deemed “emergency”;
15. Possess a streamlined process to create regular schedules with recipients that meet their care needs (as authorized by IHSS), communicating changes to recipients in a timely manner and ensuring back-up coverage when requested and needed.
16. Coordinate with DAS Social Workers and staff to ensure authorized hours are accurate.
17. Provide regular supervisory visits to recipients to ensure recipient safety and satisfaction with services and to effectively trouble-shoot provider issues;
18. Provide IHSS services to recipients in accordance with mutually developed schedules with recipient. IHSS services are limited to the following:
  - a) Domestic services, which includes: Sweeping, vacuuming, washing and waxing the floor surfaces; Washing kitchen counters and sinks; Cleaning the bathroom; Storing food and supplies; Taking out garbage; Dusting and tidying up; Cleaning oven and stove; Cleaning and defrosting refrigerator; Bringing in fuel for heating or cooking purposes from a fuel bin in the yard; Changing bed linen; and Miscellaneous domestic services such as changing light bulbs.
  - b) Heavy cleaning that involves thorough cleaning of the home to remove hazardous debris or dirt. The City shall have the authority to authorize this service, only at the time IHSS is initially granted, to enable the provider to perform continuous maintenance, or, if a lapse in eligibility occurs, eligibility is reestablished and IHSS services have not been provided within the previous 12 months. The City shall have the authority to authorize this service should the recipient's living conditions result in a substantial threat to his/her health/safety. Such service may also be authorized when a recipient is at risk of eviction for failure to prepare his/her home or abode for fumigation as required by statute or ordinance.
  - c) Related services include: Planning of meals; Preparation of meals includes such tasks as washing vegetables, trimming meat, cooking, setting the table, servicing the meal, cutting the food into bite-size pieces; Meal cleanup including washing, drying, and putting away dishes, pots, utensils and culinary appliances; Routine mending, laundry, ironing, folding, and storing clothes on shelves or in drawers; Reasonable food shopping and other shopping/errands limited to the nearest available stores or other facilities consistent with the recipient’s economy and needs;
  - d) Non-medical personal services limited to:
    - i. Bowel and bladder care such as assistance with enemas, emptying of catheter or ostomy bags, assistance with bed pans, application of diapers, changing rubber sheets, assistance with getting on and off commode or toilet;
    - ii. Respiration limited to nonmedical services such as assistance with self-administration of oxygen and cleaning of intermittent positive pressure breathing (IPPB) machines;
    - iii. Consumption of nutrition consisting of feeding or related assistance to recipients who cannot feed themselves or who require assistance with special devices in order to feed themselves;
    - iv. Routine bed baths;

- v. Bathing, oral hygiene, grooming;
  - vi. Dressing;
  - vii. Rubbing of skin to promote circulation, turning in bed and other types of repositioning, assistance on and off the seats and wheelchairs, or into or out of vehicles, and range of motion exercises, which shall be limited to the following:
    - 1) General supervision of exercises, which have been taught to the recipient by a licensed therapist or other health care professional to restore mobility restricted because of injury, disuse or disease.
    - 2) Maintenance therapy when the specialized knowledge and judgment of a qualified therapist is not required and the exercises are consistent with the patient's capacity and tolerance. Such exercises shall include the carrying out of maintenance programs; i.e., the performance of the repetitive exercises required to maintain function, improve gait, maintain strength, or endurance; passive exercises to maintain range of motion in paralyzed extremities; and assistive walking.
  - viii. Moving into and out of bed;
  - ix. Care of and assistance with prosthetic devices and assistance with self-administration of medications. Assistance with self-administration of medications consists of reminding the recipient to take prescribed and/or over-the-counter medications when they are to be taken and setting up medi-sets;
  - x. Routine menstrual care limited to application of sanitary napkins and external cleaning;
  - xi. Ambulation consisting of assisting the recipient with walking or moving the recipient from place to place.
- e) Accompaniment services when the recipient's presence is required at the appointment and assistance is necessary to accomplish the appointment are limited to:
- i. Accompaniment to and from appointments with physicians, dentists and other health practitioners;
  - ii. Accompaniment necessary for fitting health related appliances/devices and special clothing;
  - iii. Accompaniment to the site where alternative resources provide in-home supportive services to the recipient in lieu of IHSS.
- f) Yard hazard abatement, which is light work in the yard, may be authorized for:
- i. Removal of high grass or weeds and rubbish when this constitutes a fire hazard;
  - ii. Removal of ice, snow or other hazardous substances from entrances and essential walkways when access to the home is hazardous.
- g) Protective supervision consisting of observing recipient behavior in order to safeguard the recipient against injury, hazard, or accident.

- i. This service is available for monitoring the behavior of non-self-directing, confused, mentally impaired, or mentally ill persons with the following exceptions:
  - 1) Protective supervision does not include friendly visiting or other social activities;
  - 2) Supervision is not available when the need is caused by a medical condition and the form of the supervision required is medical;
  - 3) Supervision is not available in anticipation of a medical emergency;
  - 4) Supervision is not available to prevent or control antisocial or aggressive recipient behavior.
- ii. Protective supervision is available under the following conditions:
  - 1) County IHSS staff has determined that a 24-hour need exists for protective supervision and that the recipient can remain at home safely if protective supervision is provided; and
  - 2) Services staff determines that the entire 24-hour need for protective supervision can be met through any of the following or combination of the following:
    - a. In-Home Supportive Services; and
    - b. Alternative resources; and
    - c. A reassurance phone service when feasible and appropriate.

Feasibility and appropriateness will be determined exclusively by the County IHSS staff.

Eligibility for protective supervision MUST be approved by San Francisco County. Discretion of the Grantee is not allowed.

- h) Teaching and demonstration services are provided by IHSS providers to enable recipients to perform for themselves, services which they currently receive from IHSS. Teaching and demonstration services are limited to instruction in those tasks listed in CDSS MPP 30-757.11, .13, .14, and .16.
  - i. This service shall be provided by persons who have successfully completed at least an appropriate number of hours of training, as approved by the Agency and as evidenced by a valid certificate;
  - ii. This service shall only be provided when the provider has the ability to do so effectively and safely.
- i) Paramedical services are provided under the following conditions and shall have the following characteristics:
  - i. The activities, which persons would normally perform for themselves but for their functional limitations;
  - ii. The activities, which, due to the recipient's physical or mental condition, are necessary to maintain the recipient's health.
    - 1) The services shall be provided when ordered by a licensed health care professional who is lawfully authorized to do so. The recipient shall select the licensed healthcare professional;

- 2) The services shall be provided under the direction of the licensed health care professional;
  - 3) The licensed health care professional shall indicate to social services staff the time necessary to perform the ordered services.
- j) IHSS in the Workplace will be provided according to AB 925, which amended Welfare and Institutions Code (WIC) section 12300 and added WIC section 14132.955.
- i. IHSS recipients are allowed to transfer service hours authorized for use in the recipient’s home to a workplace in order to enable the recipients to obtain, retain, or return to work. The IHSS recipients are not allowed additional service hours in the workplace beyond those authorized for the home.
  - ii. The COUNTY will designate which, if any, of the authorized services are to be provided in a recipient’s workplace.

19. Provide initial and on-going training to home care providers:

- a) Basic Provider Training consists of courses aiming to help home care providers master key areas of domestic and personal care. Topics to be included must contain at least the following: emergency preparedness, infection and exposure control, food and medication interaction, food safety and sanitation, home safety, OSHA requirements, rights and responsibilities, CPR and First Aid, personal care and home care standards.
- b) Advanced Provider Training consists of courses that focus on specific areas providers may need to learn more about such as fall prevention, using durable medical equipment, mental illness and substance abuse in recipients, de-escalation, and nutrition. This training may also occur in the field to assist home care providers to perform complex personal care (transfers, hooyer lift, etc.) and paramedical tasks.
- c) The Grantee shall maintain records of all home care provider’s skill assessments and specific training provided to meet minimum standards of competency.

**IHSS – Contract Mode Recipient Profile**

FY 23-24:

Average Authorized Hours per month in FY 23-24: 80,405

Heavy Cleanings FY 23-24: 319 service requests in FY 23-24 at a cost of \$732,501, or an average of \$2,297 per request.

**Contract Mode Recipient Profile as of Nov 6, 2024**

Total Cases: 1050

Age	Cases
Age 65+	52.2%
Age 18-64	47.8%

<b>Grand Total</b>	<b>100.0%</b>
--------------------	---------------

<b>Gender Identity</b>	<b>Cases</b>
Male	57.3%
Female	29.4%
Decline to State/Blank	10.8%
Transgender Male to Female	1.6%
Another Gender Identity	0.3%
Transgender Female to Male	0.1%
<b>Total</b>	<b>100%</b>

☐☐☐☐

<b>Sexual Orientation</b>	<b>Cases</b>
Straight or Heterosexual	68.5%
Decline to State	12.4%
Gay or Lesbian	6.9%
Bisexual	3.8%
Another Sexual Orientation	0.5%
Queer	0.7%
Blank/Unknown	7.2%
<b>100.0%</b>	<b>100.0%</b>

☐☐☐☐

<b>Spoken Language</b>	<b>Cases</b>
English	93.6%
Spanish	2.6%
Cantonese	1.4%
Tagalog	0.6%
Russian	0.3%
Other non-English	0.6%
Arabic	0.2%

Korean	0.2%
Mandarin	0.1%
Japanese	0.1%
Thai	0.1%
Vietnamese	0.1%
Farsi	0.1%
ASL (American Sign Language)	0.1%
<b>100.0%</b>	<b>100.0%</b>

Paramedical Cases in November 2024	36
Average of Clients' Paramedical Hours Authorized to Pay (July 2019)	26

<b>Neighborhood</b>	<b>Cases</b>
Hayes Valley/Civic Center/Tenderloin	31.1%
South of Market	24.3%
Polk/Russian Hill/Nob Hill	14.2%
Mission District/Bernal Heights	5.5%
Western Addition/Japantown	5.5%
Bayview/Hunters Point	1.8%
Sunset	1.8%
Rincon Hill	3.0%
Castro/Noe Valley	1.7%
Outer Richmond	1.5%
North Beach	1.3%
Visitacion Valley	0.7%
Haight-Ashbury	1.6%
Potrero Hill/SOMA	1.8%
Ingleside/Excelsior	1.5%
Chinatown	0.7%
Inner Richmond	1.0%
Twin Peaks/Glen Park	0.8%
Total	100.0%

## **B. Objectives**

Respondents should state in measurable, quantifiable terms the service and outcome objectives they will achieve in providing these services. The major purpose of objectives is to measure quantity, quality, and impact of services. In measuring these areas, a balance should be created

between the value of the information and the time/effort required to collect the information. The objectives stated in the proposal may be incorporated as part of the program's evaluation plan.

### **1. Service Objectives**

As part of the proposal, the respondent will be required to develop specific service objectives that measure the quantity and other aspects of services. The objectives should state the target quantities and match the program services as proposed.

On an annual basis, the Grantee will meet the following Service Objectives:

1. Grantee will provide an annual average of at least 65% of Total Authorized Hours of IHSS to recipients who frequently decline services.
2. Grantee will provide an annual average of at least 99% of Authorized Hours of IHSS when recipients are available for and accept service.
3. Grantee will provide services to new recipients within the DAS-required 5 business day period or 24-hour emergency period, as specified by DAS Social Worker.
4. Grantee will dispatch replacement workers to recipients needing non-personal care within four (4) hours of notification that the scheduled worker did not show up.
5. Grantee will dispatch replacement workers to recipients needing personal care within two (2) hours of notification that the scheduled worker did not show up.
6. Grantee will follow DAS protocols to notify IHSS of problems with service delivery 99% of the time.
7. Grantee will provide basic Skill Development Training to 100% of its staff providers.
8. Grantee will provide advanced Skill Development Training to 75% of its staff providers.
9. Grantee will provide California Mandated Reporter training, on an annual basis, to 100% of its staff providers.
10. Grantee will administer an annual, comprehensive, anonymous satisfaction survey to 100% of recipients (provided in the language spoken by the recipients). There will be at least a 30% response rate.

### **2. Outcome Objectives**

As part of the proposal, the respondent will be required to develop specific outcome objectives that demonstrate and measure the impact, outcomes, or results of services. Both quantitative and qualitative analysis shall be applied to measure program efficiency and effectiveness. The outcome objectives specified below will be required for each grant.

On an annual basis, the Grantee will meet the following Outcome Objectives:

1. On the annual, comprehensive, anonymous satisfaction survey of recipients (provided in the language spoken by the recipients), 95% of responsive recipients will indicate the following:
  - a) the Grantee services helped them remain living independently at home
  - b) the Provider regularly arrived on time
  - c) the Provider provided the necessary authorized services

- d) the Provider responded satisfactorily to recipient requests regarding preferred care methods
  - e) the recipient could communicate to Grantee staff in native language
  - f) the cultural and ethnic needs were met (e.g., food preparation)
  - g) the level of provider supervision and support to recipient was adequate to meet recipient needs
  - h) if the recipient had encountered problems in service delivery, that the problems were resolved in a timely and satisfactory manner.
2. In the annual home care provider evaluations conducted by the Field Supervisors, 95% of recipients rate their Providers quality of work as “good” or “excellent” in the areas of:
    - a) quality of work
    - b) ability to perform all authorized tasks
    - c) relationship to recipient
    - d) communication skills with recipient
    - e) sensitivity to recipient’s needs
    - f) timeliness
  3. Quarterly compilation of 20% of home care provider electronic timesheets will show that 95% of recipients received care on-time.

### **C. Reporting Requirements**

In all respects the grantee shall comply with Federal, State and City reporting requirements.

#### **1. Annual Reporting Requirements:**

- a) A Contract Mode Quality Assurance Plan and Report that details annual findings from the ongoing comprehensive quality assurance activities designed to objectively and systematically monitor the quality of IHSS provided to recipients. The report must include proposals for addressing any areas in which Grantee did not meet its own standards for the coming year.
- b) A Skill Development Training Plan including curriculum and training goals.
- c) A Skill Development Training Annual Report that describes training provided and results of identified goals

#### **2. Quarterly Reporting Requirements:**

Quarterly reporting will include data on progress toward each service and outcome objective as required in Section VI, Outcome Objectives.

- a) Grantee shall submit a Utilization Management (UM) quarterly report that includes analysis of service utilization trend, rationale of underutilization, and projection of future utilization.

#### **3. Monthly Reporting Requirements:**

Monthly reporting will include a wide range of program information. The following is a list of the information to be reported on a monthly basis. Reports must be submitted via both email and in a format provided by HSA.

- a) Hours Authorized
- b) Hours Served
- c) Client Requested Hours
- d) Lock-Out Hours (client no show or refusal)
- e) Cancelled hours (within control of contractor and beyond control of contractor)
- f) Percentage of authorized hours served
- g) Number of recipients served
- h) Heavy Cleanings performed
- i) Overserved hours (Hours served over IHSS authorized hours)
- j) CMIPS II billing rejects

#### **4. CMIPS II Contractor Interface (COIN) Procedure Requirement**

The purpose of the Contractor Interface is to audit contractor invoices and assist with monitoring their performance in providing services to IHSS recipients. The Grantee will produce a file of payroll invoices and submit these invoices electronically into CMIPS II; invoices can be processed after files are created in CMIPS II.

- a) The contracting agency bills the county electronically through CMIPS II for each IHSS recipient's served hours. Each IHSS recipient's case will be billed based on the following period:
  - i. The 1st through 31st due before the 6th of the following calendar month
- b) The invoice processing will result in authorized or rejected records, which will be accessible by the counties through CMIPS II Reports. Authorized hours will be posted in each recipient's CMIPS II case. The CMIPS II County Contractor Invoice screen will show each recipient's updated amount approved for payment, per pay period.
- c) The validated claims are processed for payment and will be posted to the recipient case. The CMIPS II County Contractor Invoice screen for each recipient is updated with the amount approved for payment for each pay period. The error information is reported back to County Contractor Coordinator who will coordinate reconciliation with the Grantee for the next submission pay period.

#### **D. SF HSA Mandatory Training and Meeting Requirements**

DAS conducts case conferences on a weekly or as needed basis either virtually or in its offices at 1650 Mission Street, San Francisco, with its IHSS Grantees. The purposes of these conferences are to discuss:

- a) Service delivery issues about individual recipients; and
- b) Other issues of concern of either SF DAS and/or the Grantee.

Attendance of these meetings is mandatory, and all appropriate information and minutes obtained from the meetings must be disseminated to all attendees. The Grantee is responsible for maintaining information and minutes from these meetings in its recipient files.

It is important for effective and efficient service delivery that the Grantee has a good understanding of State In-Home Supportive Services rules and regulations, as well as local IHSS program policies and procedures. Grantee must designate key management and supervisory staff to attend designated trainings with the DAS IHSS program and to demonstrate a clear understanding of IHSS regulations, the method by which services are authorized by the San

Francisco IHSS program, as well as the DAS IHSS program's procedures for Contract Mode cases. Trained Grantee staff will be responsible for training other agency staff on IHSS Program regulations and procedures.

DAS may also require ad hoc, monthly and/or quarterly meetings to discuss on-going operations. Key staff with operational and budget authority must attend and participate in these meetings.

### **E. Quality Assurance Requirements**

- a) Grantee must develop an annual written Quality Assurance Program with clearly defined goals, measurements, mechanisms and frequencies of monitoring each year. Grantee will report on this plan annually as stated above. The Quality Assurance Program must include at a minimum, standards for the following service delivery elements:
  - i. Rate of turnover of primary Home Care Provider for recipients
  - ii. Home Care Provider training
  - iii. Number of Supervisory visits with recipients per year
  - iv. Rate of ability to match language and cultural needs of recipients
  - v. Number of monthly/annual terminated services and reasons for the discontinuations
  - vi. Number of monthly/annual service holds due to recipient refusal of service and lock-outs.
- b) Grantee must develop and implement a Policy and Procedures manual that includes selection protocol and oversight of home care providers to ensure that the home care providers selected are competent in performing IHSS tasks according to the State mandates. The manual must also include procedures for working with recipients who refuse services, are violent, verbally aggressive, or threatening towards home care providers/leadership staff, lack impulse control, and who live in dangerous environments. The manual must include the procedure and steps to be taken prior to the termination of an IHSS recipient for any reason, This must include the process of collaborating with community partners and DAS IHSS to resolve potential service barriers prior to a decision to suspend or terminate services (e.g., case conference, multi-disciplinary team meeting). The manual must also include clear procedures for communication between the Grantee and DAS IHSS regarding any pause in recipient services. This manual is to be shared with the County annually. The Grantee must forward any changes in the Policy and Procedures manual to the County.
- c) Grantee must develop and implement a recruitment program that clearly defines short and long term goals in recruiting qualified providers that will meet the needs of a diverse and at-risk population.
- d) Grantee must develop and implement a Grievance Policy and Procedure following HSA polices and listing required steps for a timely communication to HSA of all grievances filed, actions taken to resolve the grievances, the results, and the follow up plans, within a maximum of 30 days of grievances filed by recipients.
- e) Grantee must develop and implement a clearly defined Utilization Management (UM) structure and processes including data collection mechanism, data analysis, executive summary, follow up action plans, and responsible individuals for tracking service hours. The analysis must be conducted on a quarterly basis and, at a minimum,

include the trend of service utilization, rationale of underutilization, and projection of future utilization.

- f) Grantee must develop and implement a written Confidentiality Program that complies with HIPAA and other SF City and HSA confidentiality requirements and describe in detail how the confidentiality of recipient information is maintained.
- g) Grantee will develop and implement a Recipient Satisfaction Survey instrument to measure the quality of care received by the recipients on an annual basis. The instrument must be provided in the language spoken by the recipients and include indicators described in Section VI, Outcome Objectives.
- h) Grantee will develop and implement a Home Care Provider Evaluations instrument to annually measure the performance of the providers.

#### **F. Personal Care Services Program and IHSS Plus Waiver Enrollment Requirements**

- a) The Grantee will become the enrolled provider in the contract mode for the Personal Care Service Program (PCSP) and IHSS Plus Waiver Enrollment (IPW). This will occur as soon as San Francisco County has a signed enrollment form from the Grantee in its possession. The Grantee shall, at a minimum, certify the following:
  - i. All employees of the grantee are qualified to provide the care authorized;
  - ii. All claims submitted to the San Francisco County for services to recipients of IHSS and provided by the grant, will be provided as authorized for the recipient;
  - iii. That payment of the claims will be from federal and/or state funds and that any false statement, claim, or concealment of information may be prosecuted under federal, and/or state laws; and
  - iv. That services will be offered and provided without discrimination based on race, religion, color, national or ethnic origin, sex, sexual orientation, age, or physical or mental disability.

#### **5. Grantee will provide Ad Hoc reports as required by the Department.**

### **III. SUBMISSION REQUIREMENTS**

#### **A. Time and Place for Submission of Proposals**

Proposers shall submit one (1) electronic pdf copy of the proposal and one (1) electronic Excel copy of the budget to [Candace.Gray@sfgov.org](mailto:Candace.Gray@sfgov.org) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org). Electronic file title should include RFP number, agency name, number of files submitted i.e. 1 of 4. Proposals must be received by 3:00 p.m. on January 15, 2025. Late submissions will not be considered. Supplemental documents or revisions after the deadline will not be accepted.

**Department staff will confirm receipt of all Respondent submissions within one (1) business day after the deadline for receipt noted above.**

#### **B. Format**

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel); typed in a 12-point serif font (i.e. Times New Roman, not Arial); text should be double-spaced

and unjustified (i.e., with a ragged-right margin); page margins should be at least 1” on all sides (excluding headers and footers).

### **C. Content**

Organizations interested in responding to this RFP must submit the following information, in the order specified below. All proposals for funding must be developed using the format below. This is necessary so that all proposals can receive fair and equal evaluation. Proposals not following the required format will not be considered for funding. Information must be at a level of detail that enables effective evaluation and comparison between proposals by the Proposal Evaluation Panel. The Respondent must ensure that the proposal addresses the Selection Criteria.

**1. Table of Contents**

Each proposal package should contain a complete table of contents showing page numbers. All pages in the package must be numbered consecutively, and major sections must be indexed.

**2. RFP Cover Page – (use form provided in Section IX)**

Submit the cover page signed by a person authorized to obligate the organization to perform the commitments contained in the proposal. Submission of this document will constitute a representation by the organization that the organization is willing and able to perform the commitments contained in the proposal.

**3. Minimum Qualifications – up to 3 pages**

All agencies submitting proposals for funding must provide a *Minimum Qualifications Documentation* describing in detail how the proposing agency meets each of the Minimum Qualifications. Any proposals failing to demonstrate these qualifications will be considered non-responsive and will not be eligible for proposal review/award. (refer to section IV, Item A)

**4. Contracts/Grants (both public and private) – up to 2 pages**

Agencies should submit a statement listing relevant contracts and grants with a description of the services which have been completed during the last three (3) years. The statement must also list any failure or refusal to complete a contract or grant, including details and dates. Include any unresolved and/or outstanding findings from any program or fiscal/compliance visits done by the City. If no outstanding issues, provide a statement that your agency is in full compliance with program and fiscal monitoring. Provide disclosure of any litigation including Respondent, subcontracts, or any principal officers thereof in connection with any contract or grant.

**5. Organizational Capacity – up to 5 pages (not including resumes/job descriptions)**

Description of your agency’s ability to deliver the services proposed in this RFP. In addition, please address the following:

- a) Briefly explain how your organization is qualified to implement the proposed services. Demonstrate your management/supervisory infrastructure, as well as your administrative/financial capacity to deliver the proposed services.
- b) Describe your experience with/history of successfully providing these services, and serving this population/community. Describe recently completed projects, including quality, requirements, timelines, and/or success. Demonstrate ability to implement new programming and/or services.
- c) Describe the staffing patterns needed to provide the proposed services. Clearly identify whether services will be performed by existing staff or by proposed staff.

Attach job descriptions and resumes of key program staff and clearly identify which staff position they occupy. Provide written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's prior approval. Describe relevant staff training plans to ensure services are provided in an efficient manner and service and outcome objectives are being achieved.

- d) A description of the organization's plans, strategies, and activities to address racial equity, cultural competence and inclusion among staff and program participants, as well as internal controls to regularly review current practices through the lens of racial equity and inclusion to identify areas of improvement, including cultural and linguistic competencies, related to working with the identified Target Population and the envisioned program design. Describe agencies' language and cultural capacity.

**6. Program Approach – up to 10 pages**

Description of your agency's specific program approach to deliver the services proposed in this RFP. In addition, please address the following:

- a) Describe your specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations in this RFP (be sure to address all applicable items listed in Target Population, Scope of Work, and Service and Outcome Objectives). Describe the linkages that will connect clients to services.
- b) Identify the proposed site that will be made available for the target population. Explain how the facility/site is appropriate for the services proposed. Describe plan for location and hours of programming and/or services. Include Site Chart.
- c) Identify any subcontractors and describe their responsibilities in the delivery of services. Provide MOU or letter of intent.
- d) List and explain the specific service and outcome objectives to be accomplished and how they will be measured. Describe methods for data collection, documentation, and reporting on service and outcome objectives.
- e) Describe the proposed model for clients to offer input regarding program design, service delivery and program operations.
- f) Describe the proposed model for problem-solving and meeting the complex care needs of recipients who have a history of refusing services.
- g) Describe the proposed model for problem-solving recipient matters that are behavioral health-related and pose a barrier to services being rendered.
- h) Describe your retention plan for In-home Care Providers. Include a description of any clear promotional opportunities for In-home Care Providers within your agency.

**7. Fiscal Capacity (Budget) – up to 6 pages on form provided (excluding cost allocation plan and audited financial statement)**

Please refer to the instructions outlined in Section XI and use only SFHSA approved budget forms. Provide Cost Allocation Plan and current audited financial statements. The SFHSA intends to award this grant to respondents that it considers will provide the best overall program services at a reasonable pricing structure. The SFHSA reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

Using the budget forms, please provide the direct expenses for all proposed costs to be supported through this grant. Respondents must also provide a Budget Justification that clearly explains the basis for each expense listed in the budget.

Discuss any planned leveraging of other resources (i.e., fund raising, in-kind contributions, volunteers, etc.), if any, to support the program approach proposed. Identify external resources committed to this program, including in-kind resources designated solely for this program. Assign a dollar value for all external resources.

**8. Completed Page Number Form (refer to Section X)**

**IV. PROPOSAL EVALUATION CRITERIA**

**A. Minimum Qualifications (Pass/Fail)**

Proposers must provide documentation that clearly demonstrates each Minimum Qualification (MQ) listed below has been met at time of submission. Minimum Qualification documentation should be clearly marked as “MQ1”, MQ2”, etc. to indicate which MQ it supports. Each Proposal will be reviewed for initial determination on whether Proposer meets the MQs referenced in this section. **This screening is a pass or fail determination and a Proposal that fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

MQ #	Description
<b>MQ1</b>	Proposer has 3 years of experience providing in-home supportive services to older adults and adults with disabilities or similar services to the target population as described in the RFP.
<b>MQ2</b>	Proposer has 1-2 years of experience implementing Diversity, Equity, Inclusion and Belonging curriculum, training and practices to meet the linguistic and cultural needs of older adults and adults with disabilities served.
<b>MQ3</b>	A nonprofit organization with a 501(c)(3) determination and/or equivalent.
<b>MQ4</b>	Must be willing and able to comply with the City contracting requirements set forth in Section VIII of this RFP.
<b>MQ5</b>	Current certified vendor or the ability to become a certified vendor with the City and County of San Francisco within ten (10) days of notice of award.

Proposals should clearly demonstrate that the qualifications are met. Insufficient or incomplete information may result in a proposal being considered non-responsive and may not be eligible for award of the grant.

All proposed subcontractors MUST also meet MQs.

**Please note:** Agencies submitting proposals that have previously contracted with the City and County of San Francisco and/ or Federal agencies to provide goods and/or services must successfully demonstrate compliance with performance/monitoring requirements specified in previous grants/contracts (corrective actions) in order to be considered responsive to this RFP. **Documented failure to correct performance/monitoring deficiencies identified in past City and County grants/contracts may result in Agency disqualification to participate in this RFP.** Provide a statement of any unresolved and/or outstanding findings from any program or fiscal/compliance visits done by the City. If no outstanding issues, provide a statement that your agency is in full compliance with program and fiscal monitoring. (Refer to section III.C.4)

## **B. Selection Criteria**

The proposals will be evaluated by a selection committee comprised of parties with expertise in the service areas identified in this RFP. The City intends to evaluate the proposals generally in accordance with the criteria itemized below.

### Total Possible Points: 100

#### Organizational Capacity (40 points)

- 1) Did respondent explain how the organization is qualified to implement the proposed services? Did they demonstrate the management/supervisory infrastructure, as well as the administrative/financial capacity to deliver the proposed services? (10 points)
- 2) Did respondent describe experience with/history of successfully providing these services, and serving this population/community? Were recently completed projects listed, detailing quality, requirements, timelines, and/or success? Did they demonstrate ability to implement new programming and/or services? (15 points)
- 3) Based on the staffing patterns described, will the program be sufficiently staffed? Based on job descriptions and qualifications, does the staff have the necessary skill, training, and experience to successfully provide the services to these clients and community? Do job descriptions include appropriate experience/qualifications for the project, realistic description of tasks to be performed, reasonable workload/ work schedule? Were relevant staff training plans clearly described? (10 points)
- 4) Does the agency clearly demonstrate how racial equity and cultural competence values are exemplified through their organizational and program operations? This should include a description of the organization's plans, strategies, and activities to address racial equity and inclusion among staff and program participants, as well as internal controls to regularly review current practices through the lens of racial equity and inclusion to identify areas of improvement. Do they address the agencies language and cultural capacity? (5 points)

#### Program Approach (35 points)

- 1) Does the respondent clearly describe the agency's specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations in this RFP? Did they address Target Population, Scope of Work, and Service/Outcome Objectives? Does the respondent clearly describe the linkages that will connect clients to services? (15 points)
- 2) Is the proposed facility/site that will be made available for the target population appropriate for the services proposed? Does respondent have a plan for location and hours of programming and/or services? Did respondent include a Site Chart? (5 points)
- 3) Does the respondent describe specific service and outcome objectives to be accomplished and how they will be measured? Does the respondent include an explanation of methods for data collection, documentation, and reporting on service and outcome objectives? Are any subcontractors identified? If so, are their responsibilities in the delivery of services clearly defined? Did respondent provide an MOU or letter of intent? (10 points)

- 4) Does the proposed model include methods for clients to offer input regarding program design, service delivery and program operations? Does the proposed model include methods for problem-solving and meeting the complex care needs of recipients who have a history of refusing services? Does the proposed model include methods for problem-solving recipient matters that are behavioral health-related and pose a barrier to services being rendered? Does the proposed retention plan for In-home Care Providers include a description of any clear promotional opportunities for In-home Care Providers within the agency? (5 points)

Fiscal Capacity (25 points)

- 1) Does the budget reflect sound, adequate allocation of resources, matching the program components including staffing costs, operating costs and capital costs (as appropriate)? Is the budget correct and easy to understand? (10 points)
- 2) Are the overall costs reasonable, and competitive with other proposals? Are specific costs reasonable, justified, and competitive? Does the cost allocation support the services as proposed? Are the current audited financial statements provided? (10 points)
- 3) Does respondent describe their ability to leverage other resources for this program, either from in-kind, and/or external resources? Does the proposal reflect the effective use of organizational resources/external resources, including funds leveraged exclusively for this program? (5 points)

**V. PRE-PROPOSAL CONFERENCE AND GRANT AWARD**

**A. Pre-Proposal Conference**

Proposers are encouraged to attend a Pre-Proposal Conference on December 26, 2024 at 10:30 AM to be held via teleconference. All questions will be addressed at this conference and any available new information will be provided at that time. If you have further questions regarding the RFP, please contact the individual designated in Section VI. A.

**B. Award**

SFHSA will select a proposer with whom Agency staff shall commence grant negotiations. The selected proposal will be part of the final grant and will be used as a starting point for negotiations. The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further negotiations and approvals before the City may be legally bound thereby. SFHSA may negotiate modifications after the bid/proposal has been selected to assure that all necessary program requirements are covered before the grant is signed. If a satisfactory grant cannot be negotiated in a reasonable time, SFHSA, in its sole discretion, may terminate negotiations with the highest ranked proposer and begin grant negotiations with the next highest ranked proposer.

**C. Written Questions and Requests for Clarification**

Proposers are encouraged to submit written questions to [Tara.Alvarez@sfgov.org](mailto:Tara.Alvarez@sfgov.org) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org). All questions will be addressed and any available new information will be provided in writing via email to proposers. All written questions must be submitted on or prior to December 31, 2024 at 10:30 AM.

## VI. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

### A. Inquiries Regarding RFP

All inquiries regarding the RFP or clarification of the RFP, must be directed to: [Candace.Gray@sfgov.org](mailto:Candace.Gray@sfgov.org) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org)

### B. How to Register as a City Supplier

The following requirements pertain only to Proposers not currently registered with the City as a Supplier.

**Step 1:** Register as a BIDDER at City's Supplier Portal:

<https://sfcitypartner.sfgov.org/pages/index.aspx>

**Step 2:** Follow instructions for converting your BIDDER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector's Office and submit Chapter 12B and 12C forms through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector's Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **San Francisco Labor Code 131 and 132 Inquiries:** For questions concerning the San Francisco Labor Code 131 and 132 Equal Benefits and Non-Discrimination in Contracting requirements, go to: [www.sfgov.org/cmd](http://www.sfgov.org/cmd)

### C. Proposal Questions and Submissions

#### 1. Proposer Questions and Requests for Clarification

Proposers shall address any questions regarding this Solicitation to [Tara.Alvarez@sfgov.org](mailto:Tara.Alvarez@sfgov.org) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org). Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to [Tara.Alvarez@sfgov.org](mailto:Tara.Alvarez@sfgov.org) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org) no later than Written Questions Due Date.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>.

#### 2. Proposal Format

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel); typed in a 12-point serif font (i.e. Times New Roman, not Arial); text should be double-spaced and unjustified (i.e., with a ragged-right margin); page margins should be at least 1" on all sides (excluding headers and footers). Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow formatting, submission, or content requirements, as well as page limit restrictions (if any), may negatively impact the evaluation of your Proposal.

#### 3. Time and Place for Submission of Proposals

Proposers shall submit one (1) electronic pdf copy of the proposal and one (1) electronic Excel copy of the budget to [Candace.Gray@sfgov.org](mailto:Candace.Gray@sfgov.org) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org). Electronic file title should include RFP number, agency name, number of files submitted i.e., 1 of 4. Proposals must be received by 3pm, on January 15, 2025. Late submissions will not be considered. Supplemental documents or revisions after the deadline will not be accepted.

**Department staff will confirm receipt of all Respondent submissions within one (1) working day after the deadline for receipt noted above.**

#### **D. Proposal Addenda**

The City may modify this Solicitation, prior to the Proposal Due Date, by issuing an Addendum to the Solicitation, which will be posted on the San Francisco Supplier Portal. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor the event for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Addenda issued by the City prior to the Proposal Due Date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal Due Date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

**THE SUBMITTAL OF A RESPONSE TO THIS SOLICITATION SHALL EXPLICITLY STIPULATE ACCEPTANCE BY PROPOSERS OF THE TERMS FOUND IN THIS SOLICITATION, ANY AND ALL ADDENDA ISSUED TO THIS SOLICITATION, AND THE PROPOSED GRANT TERMS.**

#### **E. Public Disclosure**

All documents under this solicitation process are subject to public disclosure per the California Public Records Act (California Government Code Section §6250 et. Seq) and the San Francisco Sunshine Ordinance (San Francisco Administrative Code Chapter 67). Contracts, Proposals, responses, and all other records of communications between the City and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this Administrative Code provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefit until and unless that person or organization is awarded the contract or benefit.

If the City receives a Public Records Request ("Request") pertaining to this solicitation, City will use its best efforts to notify the affected Proposer(s) of the Request and to provide the Proposer with a description of the material that the City deems responsive and the due date for disclosure ("Response Date"). If the Proposer asserts that some or all of the material requested contains or reveals valuable trade secret or other information belonging to the Proposer that is exempt from disclosure and directs the City in writing to withhold such material from production ("Withholding Directive"), then the City will comply with the Withholding Directive on the condition that the Proposer seeks judicial relief on or before the Response Date. Should Proposer fail to seek judicial relief on or before the Response Date, the City shall proceed with the disclosure of responsive documents.

#### **F. Limitation on Communications During Solicitation**

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancellation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer's control, shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee – is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol

does not apply to communications with the City regarding business not related to this Solicitation.

#### **G. Proposal Selection Shall Not Imply Acceptance**

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

#### **H. Cybersecurity Risk Assessment**

As part of City's evaluation process, City may engage in Cybersecurity Risk Assessment (CRA). CRA may be performed for each entity manufacturing the product, performing technical functions related to the product's performance, and/or accessing City's networks and systems. Where a prime grantee or reseller plays an active role in each of these activities, CRA may also be required for the prime grantee or reseller.

To conduct a CRA, City may collect as part of this Solicitation process one of the following two reports:

- **SOC-2 Type 2 Report:** Report on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy; or
- **City's Cyber Risk Assessment Questionnaire:** Proposer's responses to a City's Cyber Risk Assessment Questionnaire.

The above reports may be requested at such time City has selected or is considering a potential Proposer. The reports will be evaluated by the soliciting Department and the City's Department of Technology to identify existing or potential cyber risks to City. Should such risks be identified, City may shall afford a potential Proposer an opportunity to cure such risk within a period of time deemed reasonable to City. Such remediation and continuing compliance shall be subject to City's on-going review and audit through industry-standard methodologies, including but not limited to: on-site visits, review of the entities' cybersecurity program, penetration testing, and/or code reviews.

#### **I. Solicitation Errors and Omissions**

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

#### **J. Objections to Solicitation Terms**

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the City setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

#### **K. Notice of Intent to Award-Required Documentation**

After the City issues a Notice of Intent to Award, and before award, if requested by the City, the successful Proposer must possess all qualifications required for the contract. Any failure to demonstrate satisfaction of one or more of following requirements, if requested by the City, will

be considered sufficient for the disqualification of the Proposer as nonresponsive and will entitle the City to terminate negotiations and move to the next highest ranked Proposer for award.

1. Proposer is registered in the System of Award Management (SAM) and has no exclusions (<https://usfcr.com/search-sam-cage-duns/>) ;
2. Proposer is in good standing with the California Secretary of State (<https://bizfileonline.sos.ca.gov/search/business>);
3. Proposer is in good standing with the Franchise Tax Board (<https://webapp.ftb.ca.gov/eletter/?Submit=Check+Status>);
4. Proposer is in good standing with the Internal Revenue Service (<https://apps.irs.gov/app/eos/>) ;
5. Proposer is in good standing with California Attorney General's Registry of Charitable Trusts (<https://rct.doj.ca.gov/Verification/Web/Search.aspx?facility=Y>)
  - a. To receive a grant under this Solicitation, any nonprofit proposer must be in good standing with the California Attorney General's Registry of Charitable Trusts by the time of grant execution and must remain in good standing during the term of the agreement. Upon request, proposer must provide documentation to the City demonstrating its good standing with applicable legal requirements. If proposer will use any nonprofit subgrantees to perform the agreement, proposer will be responsible for ensuring they are also in compliance with all requirements of the Attorney General's Registry of Charitable Trusts at the time of grant execution and for the duration of the agreement.

**Note: Proposer's failure to remain in good standing with the above after award will entitle the City to immediately terminate the contract for default with no opportunity for the Proposer to cure.**

## **L. Protest Procedures**

### **1. Protest of Non-Responsiveness Determination**

Within three (3) business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsiveness. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **2. Protest of Award**

Within three (3) business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **3. Protest of Contract Award**

Within three (3) business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest

is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

#### **4. Delivery of Protests**

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by email to [Candace.Gray@sfgov.org](mailto:Candace.Gray@sfgov.org) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org) and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

Executive Director  
Human Services Agency  
P.O. Box 7988  
San Francisco, CA 94120  
[Trent.Rhorer@sfgov.org](mailto:Trent.Rhorer@sfgov.org)

#### **M. Proposal Term**

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal Due Date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.

#### **N. Revision to Proposal**

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal Due Date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal Due Date for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

#### **O. Proposal Errors and Omissions**

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

#### **P. Financial Responsibility**

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.

#### **Q. Proposer's Obligations under the Campaign Reform Ordinance**

If a contract awarded pursuant to this Solicitation has (A) a value of \$100,000 or more in a fiscal year and (B) requires the approval of an elected City official, Proposers are hereby advised:

1. Submission of a Proposal in response to this Solicitation may subject the Proposers to restrictions under Campaign and Governmental Conduct Code Section 1.126, which prohibits City contractors, Proposers, and their affiliates from making political contributions to certain City elective officers and candidates; and
2. Before submitting a Proposal in response to this Solicitation, Proposers are required to notify their affiliates and subcontractors listed in the awarded contract or Proposal of the political contribution restrictions set forth in Campaign and Governmental Conduct Code section 1.126.

This restriction applies to the party seeking the contract, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated and no contract is awarded; or (2) twelve months have elapsed since the award of the contract.

A violation of Section 1.126 may result in criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at **(415) 252-3100** or go to <https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders>.

#### **R. Reservations of Rights by the City**

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
2. Reject any or all Proposals;
3. Reissue the Solicitation;
4. Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;
5. Procure any materials, equipment or services specified in this Solicitation by any other means; or
6. Determine that the subject goods or services are no longer necessary.

#### **S. No Waiver**

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or take action on account of a Proposer's failure to comply with this Solicitation.

## **T. Other**

1. The City may make such investigation, as it deems necessary, prior to the award of this contract to determine the conditions under which the goods are to be delivered or the work is to be performed. Factors considered by the City shall include, but not be limited to:

- a. Any condition set forth in this Solicitation;
- b. Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
- c. Delivery time(s).

2. City reserves the right to inspect an awarded Proposer's place of business prior to award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.

3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.

4. City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.

5. Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.

## **U. Local Business Enterprise Goals and Outreach**

Per Section 14B.2 of the Admin Code, Chapter 14B requirements do not apply to grants, whether funded by the City or by Federal or State grant funds, to a nonprofit entity to provide services to the community.

## **VII. CITY'S SOCIAL AND ECONOMIC POLICY REQUIREMENTS**

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social and Economic Policy Requirements"). These Social and Economic Policy Requirements set forth below, which Proposers are encouraged to carefully review. The Social and Economic Policy Requirements set forth below are not intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it.

### **A. Proposers Unable to do Business with the City**

#### **1. Generally**

Proposers that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below.

#### **2. San Francisco Labor and Employment Code Article 131.2**

A Proposer selected pursuant to this Solicitation may not, during the term of the Agreement, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts,

moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in Article 131.2(b) of the San Francisco Labor and Employment Code.

#### **B. Health Care Accountability Ordinance (HCAO)**

A Proposer selected pursuant to this Solicitation shall comply with the requirements of Labor and Employment Code Article 121. For each Covered Employee, an awarded Proposer shall provide the appropriate health benefit set forth in Article 121.3 of the Health Care Accountability Ordinance (HCAO). If a Proposer selected pursuant to this Solicitation chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of the Article 121 and the Health Commission's minimum standards are available at <https://www.sf.gov/information/health-care-accountability-ordinance>.

Any Subcontract entered into by Proposer shall also be required to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this section.

#### **C. Minimum Compensation Ordinance**

A Proposer selected pursuant to this Solicitation shall comply with Labor and Employment Code Article 111. A Proposer selected pursuant to this Solicitation shall pay covered employees no less than the minimum compensation required by San Francisco Labor and Employment Code Article 111, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Article 111. Information about and the text of the Article 111 is available on the web at <https://www.sf.gov/information/minimum-compensation-ordinance>.

#### **D. First Source Hiring Program**

A proposer selected pursuant to this solicitation shall comply with all of the provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code that apply to this agreement and an awarded proposer is subject to the enforcement and penalty provisions in Chapter 83.

#### **E. Other Social Policy Provisions**

Attachment 1, City's Contract Terms, identifies the City's applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

### **VIII. GRANT REQUIREMENTS**

#### **A. Grant Terms and Negotiations**

The successful Proposer will be required to enter into the Agreement in the form attached hereto as Attachment 1, City's Proposed Agreement Terms. **City's Proposed Agreement Terms are attached in the Attachment 1: Grant Agreement (form G-100).** However, Proposers may identify those contract terms to which they object as part of the questions they submit by the

Questions Due Date. City shall evaluate all objections and determine what, if any changes, will be incorporated into City's Contract Terms prior to the Proposal Due Date. Any such changes will be made known to all Proposers through an Addendum to this Solicitation. Failure to timely execute the Proposed Agreement, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the Proposed Agreement, shall be deemed an abandonment of the Proposal and City, in its sole discretion, may select another Proposer and proceed against the original selectee for damages.

## **B. Insurance Requirements**

1. Types and Amounts of Coverage. Without limiting Grantee's liability, Grantee shall maintain in force, during the full term of the grant agreement, insurance in the following amounts and coverages. Limits of insurance may be increased according to the Scope of Work, risk, and amount of contract:
  - a. Workers' Compensation, in statutory amounts, with Employers' Liability Limits not less than one million dollars (\$1,000,000) each accident, injury, or illness.
  - b. Commercial General Liability Insurance with limits not less than \$1,000,000 each occurrence and \$2,000,000 general aggregate for Bodily Injury and Property Damage, including Contractual Liability, Personal Injury, Products and Completed Operations. Policy must include Abuse and Molestation coverage.
  - c. Commercial Automobile Liability Insurance with limits not less than one million dollars (\$1,000,000) each occurrence Combined Single Limit for Bodily Injury and Property Damage, including Owned, Non-Owned and Hired auto coverage, as applicable.

If professionals are used as part of the grant agreement, professional liability will be required:

- d. Professional liability insurance for negligent acts, errors or omission with respect to professional or technical services, if any, required in the performance of this Agreement with limits not less than one million dollars (\$1,000,000) each claim.

Grantees that will provide technology type services must provide Technology Errors and Omissions Liability insurance. Limits of insurance may be increased according to the Scope of Work, risk, and amount of contract:

- e. Technology Errors and Omissions Liability coverage, with limits of \$1,000,000 each occurrence and each loss, and \$2,000,000 general aggregate. The policy shall at a minimum cover professional misconduct or lack of the requisite skill required for the performance of services defined in the contract and shall also provide coverage for the following risks:
  - i. Liability arising from theft, dissemination, and/or use of confidential information, including but not limited to, bank and credit card account information or personal information, such as name, address, social security numbers, confidential social service information, protected

- health information or other personally identifying information, stored or transmitted in electronic form;
- ii. Network security liability arising from the unauthorized access to, use of, or tampering with computers or computer systems, including hacker attacks; and
  - iii. Liability arising from the introduction of any form of malicious software including computer viruses into, or otherwise causing damage to the City's or third person's computer, computer system, network, or similar computer related property and the data, software, and programs thereon.
2. Additional Requirements for General and Automobile Coverage. Commercial General Liability and Commercial Automobile Liability insurance policies shall:
    - a. Name as additional insured City and its officers, agents and employees.
    - b. Provide that such policies are primary insurance to any other insurance available to the Additional Insureds, with respect to any claims arising out of this Agreement, and that insurance applies separately to each insured against whom claim is made or suit is brought, except with respect to limits of liability.
  3. Additional Requirements for All Policies. All policies shall be endorsed to provide at least thirty (30) days' advance written notice to City of cancellation of policy for any reason, nonrenewal or reduction in coverage and specific notice mailed to City's address for notices pursuant to Article 15.
  4. Required Post-Expiration Coverage. Should any of the insurance required hereunder be provided under a claims-made form, Grantee shall maintain such coverage continuously throughout the term of this Agreement and, without lapse, for a period of three (3) years beyond the expiration or termination of this Agreement, to the effect that, should occurrences during the term hereof give rise to claims made after expiration or termination of the Agreement, such claims shall be covered by such claims-made policies.
  5. General Annual Aggregate Limit/Inclusion of Claims Investigation or Legal Defense Costs. Should any of the insurance required hereunder be provided under a form of coverage that includes a general annual aggregate limit or provides that claims investigation or legal defense costs be included in such general annual aggregate limit, such general annual aggregate limit shall be double the occurrence or claims limits specified above.
  6. Evidence of Insurance. Before commencing any operations under this Agreement, Grantee shall furnish to City certificates of insurance, and additional insured policy endorsements, in form and with insurers satisfactory to City, evidencing all coverages set forth above, and shall furnish complete copies of policies promptly upon City's request. Before

commencing any operations under this Agreement, Grantee shall furnish to City certificates of insurance and additional insured policy endorsements with insurers with ratings comparable to A-, VIII or higher, that are authorized to do business in the State of California, and that are satisfactory to City, in form evidencing all coverages set forth above. Failure to maintain insurance shall constitute a material breach of this Agreement.

7. Effect of Approval. Approval of any insurance by City shall not relieve or decrease the liability of Grantee hereunder.
8. Insurance for Subcontractors and Evidence of this Insurance. If a subcontractor will be used to complete any portion of this agreement, the grantee shall ensure that the subcontractor shall provide all necessary insurance and shall name the City and County of San Francisco, its officers, agents, and employees and the grantee listed as additional insureds.
9. Regarding Workers' Compensation, Contractor hereby agrees to waive subrogation which any insurer of Contractor may acquire from Contractor by virtue of the payment of any loss. Contractor agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation. The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the City for all work performed by the Contractor, its employees, agents and subcontractors.
10. Should any required insurance lapse during the term of this Agreement, requests for payments originating after such lapse shall not be processed until the City receives satisfactory evidence of reinstated coverage as required by this Agreement, effective as of the lapse date. If insurance is not reinstated, the City may, at its sole option, terminate this Agreement effective on the date of such lapse of insurance.

### **C. Failure to Provide Insurance and/or Bonds**

Unless otherwise stated, within ten business days of the receipt of a notice of award of a Contract, the Proposer to whom the RFP is awarded shall deliver the specified bond documents and/or insurance certificates and policy endorsements to City. If the Proposer fails or refuses to furnish the required bond and/or insurance within ten days after receiving notice to award a Contract, City may, at its option, determine that the Proposer has abandoned its Proposal. The foregoing in no way limits the damages which are recoverable by City whether or not defined elsewhere in the contract documents.

### **D. Compliance with Other Laws**

Proposers shall keep itself fully informed of City's Charter, codes, ordinances and regulations and all state, and federal laws, rules and regulations affecting the performance of the Grant Agreement and shall at all times comply with such Charter codes, ordinances, and regulations rules and laws.

### **E. HSA/DAS Policy Manuals and Memoranda**

<https://www.sfhsa.org/partner/policies-and-procedures>

**IX. RFP COVER PAGE**

**NAME OF ORGANIZATION:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**DIRECTOR:** \_\_\_\_\_

**PHONE:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

**CITY SUPPLIER IDIF KNOWN)** \_\_\_\_\_

**FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN):** \_\_\_\_\_

**AMOUNT REQUESTED:**           \$ \_\_\_\_\_

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Submit an electronic copy to [Candace.Gray@sfgov.org](mailto:Candace.Gray@sfgov.org) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org)

**X. PAGE NUMBER FORM**

This form is to assist the review panel in finding the information in the Proposal that corresponds to the evaluation criteria. For each item listed below, please list the page number(s) where the reviewer may find the answer(s) to the criteria.

<b>Evaluation and Selection Criteria</b>		
	<b>Minimum Qualifications</b>	Page Number(s)
MQ1.	Proposer has 3 years of experience providing in-home supportive services to older adults and adults with disabilities or similar services to the target population as described in the RFP.	
MQ2.	Proposer has 1-2 years of experience implementing Diversity, Equity, Inclusion and Belonging curriculum, training and practices to meet the linguistic and cultural needs of older adults and adults with disabilities served.	
MQ3.	A nonprofit organization with a 501(c)(3) determination and/or equivalent	
MQ4.	Must be willing and able to comply with the City contracting requirements set forth in Section VIII of this RFP.	
MQ5.	Current certified vendor or the ability to become a certified vendor with the City and County of San Francisco within ten (10) days of notice of award.	
<b>Organizational Capacity (40 points)</b>		
A1.	Does respondent explain how the organization is qualified to implement the proposed services? Did they demonstrate the management/supervisory infrastructure, as well as the administrative/financial capacity to deliver the proposed services? (10 points)	
A2.	Did respondent describe experience with/history of successfully providing these services, and serving this population/community? Were recently completed projects listed, detailing quality, requirements, timelines, and/or success? Did they demonstrate ability to implement new programming and/or services? (15 points)	
A3.	Based on the staffing patterns described, will the program be sufficiently staffed? Based on job descriptions and qualifications, does the staff have the necessary skill, training, and experience to successfully provide the services to these clients and community? Do job descriptions include appropriate experience/qualifications for the project, realistic description of tasks to be performed, reasonable workload/ work schedule? Were relevant staff training plans clearly described? (10 points)	
A4	Does the agency clearly demonstrate how racial equity and cultural competence values are exemplified through their organizational and program operations? This should include a description of the organization’s plans, strategies, and activities to address racial equity and inclusion among staff and program participants, as well as internal controls to regularly review current practices through the lens of racial equity and inclusion to identify areas of improvement. Do they address the agencies language and cultural capacity? (5 points)	
<b>Program Approach (35 points)</b>		

B1.	Does the respondent clearly describe the agency’s specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations in this RFP? Did they address Target Population, Scope of Work, and Service/Outcome Objectives? Does the respondent clearly describe the linkages that will connect clients to services? (15 points)	
B2.	Is the proposed facility/site that will be made available for the target population appropriate for the services proposed? Does respondent have a plan for location and hours of programming and/or services? Did respondent include a Site Chart? (5 points)	
B3.	Does the respondent describe specific service and outcome objectives to be accomplished and how they will be measured? Does the respondent include an explanation of methods for data collection, documentation, and reporting on service and outcome objectives? Are any subcontractors identified? If so, are their responsibilities in the delivery of services clearly defined? Did respondent provide an MOU or letter of intent? (10 points)	
B4.	Does the proposed model include methods for clients to offer input regarding program design, service delivery and program operations? Does the proposed model include methods for problem-solving and meeting the complex care needs of recipients who have a history of refusing services? Does the proposed model include methods for problem-solving recipient matters that are behavioral health-related and pose a barrier to services being rendered? Does the proposed retention plan for In-home Care Providers include a description of any clear promotional opportunities for In-home Care Providers within the agency? (5 points)	
<b>Fiscal Capacity (25 points)</b>		
C1.	Does the budget reflect sound, adequate allocation of resources, matching the program components including staffing costs, operating costs and capital costs (as appropriate)? Is the budget correct and easy to understand? (10 points)	
C2.	Are the overall costs reasonable, and competitive with other proposals? Are specific costs reasonable, justified, and competitive? Does the cost allocation support the services as proposed? Are the current audited financial statements provided? (10 points)	
C3.	Does respondent describe their ability to leverage other resources for this program, either from in-kind, and/or external resources? Does the proposal reflect the effective use of organizational resources/external resources, including funds leveraged exclusively for this program? (5 points)	

## XI. BUDGET FORMS AND INSTRUCTIONS

Budgets should be submitted in the standard SFHSA format. Forms are available at:

<https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>

Click on “Human Services Agency” in the Department drop-down menu and then click the link for this RFP.

The attached spreadsheets are in Excel. There are six (6) tabs: Budget Summary, Salaries and Benefits, Operating-Direct, Subcontractors-Pass Thru, Capital Expenses, and Justification.

Please note these must all be clearly and easily attributable to the specific program being funded.

The Budget Justification should be a narrative, providing detailed information and calculations supporting the amount allocated for each budget line item. Please detail all mathematical computations for each line item. Show how the total dollar amount was derived, e.g., the number of square feet of office space to be utilized multiplied by the rate per square foot, the cost per month for insurance multiplied by the number of months in the grant term, etc. For the Salaries and Benefits section, list the position, a brief sentence of the position's responsibilities, the basis for the percentage of FTE allocated to the activity, and the mathematical computation used to arrive at the total dollar amount. Also list everything being included under Fringe Benefits.

The Cost Allocation Plan is required. Respondents must follow the City’s cost allocation guidelines for nonprofit grantees, which largely follow those described by Generally Accepted Accounting Principles (GAAP) and in Federal OMB Circular A-122. The plan should include how indirect costs were calculated.

For any proposed Subcontracts over \$25,000, attach a separate detailed Subcontracting budget using the standard SFHSA format. Provide a brief explanation of the subcontracting arrangement, as well as a budget breakdown. Please note, the total subcontractor budget amount should appear on the Subcontractors-Pass Thru sheet.

Indirect rates are not allowable on Subcontractor indirect expenditures, Subcontracts over \$25,000, Capital Expenses, or Direct Client Pass-Through payments: aid payments, direct voucher payments, or any stipend, subsidy or expense paid on behalf of a client (i.e., security deposit, rental payment assistance, transportation vouchers, etc.). These examples are not intended to be a comprehensive list.

**These guidelines provide general information.** If further clarification or technical assistance is required, email [Tara.Alvarez@sfgov.org](mailto:Tara.Alvarez@sfgov.org), [Candace.Gray@sfgov.org](mailto:Candace.Gray@sfgov.org), and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org) on or prior to January 3, 2025 at 3:00 PM.